



SETTT for Success

Strategies for Effective Professional Development Facilitation

What Are Facilitation Skills?

These are the "process" skills we use to guide key parts of our organizing work with groups of people. Whether it's a Professional Learning Community (big or small) or a training session, someone must shape the professional development (PD) so that you meet your goals and accomplish what you've set out to do.

Put another way, facilitating means:

- Understanding the goals of the PD
- Keeping the group focused on the agenda
- Involving teachers in the PD

The more you know about how to shape a good professional learning experience, the more your teachers will feel confident about their own ideas and participation, stay invested in your school or district, and take on responsibility for trying something new.

How Do You Plan a Good Facilitation Process?

While achieving the goals and outcomes of the PD is important, a facilitator also needs to ensure the audience is engaged, and that the experience is the best it can be for the audience.

In planning a good PD experience, a facilitator focuses on:

- Environment
- Logistics and room arrangements
- Ground rules

Environment

There are many factors that impact how safe and comfortable people feel about interacting with each other. The environment of a PD session sets an important tone for participation.

Key questions to ask yourself as a facilitator include:

- Is the location a familiar place, one where people feel comfortable?
- Is the meeting site (in-person or virtual) accessible to everyone?
- Is the space the right size? Too large? Too small?

Logistics and Room Arrangements

How people sit, whether they are hungry, and whether they can hear you can impact your PD. As a facilitator, you should consider the logistics of the PD. Some things to consider are:

- Chair arrangements: Having chairs in a circle or around a table encourages discussion, equality, and familiarity for in-person events.

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- Sign-in sheet: Would it be helpful to provide nametags for in-person events? Is there someone who can record attendance in a virtual training?
- Refreshments: If you're having refreshments at an in-person gathering, who is bringing them? Can you set things up so participants can get food without disrupting the meeting? And who's cleaning up afterwards?
- Technology and audio-visual equipment: Do you need a microphone? Video cameras? Are you using new tools on a virtual platform (e.g., polls)? Be sure to test any technology or equipment prior to the PD.

To build a safe and comfortable environment, a good facilitator has a few more points to consider. How do you protect teachers who are worried their ideas will be attacked or mocked? How do you hold back audience members who tend to dominate while still making them feel good about their participation? Much of the answer lies in the ground rules.

Ground Rules

Most meetings have some kind of operating rules. Many facilitators have rules they've adopted over time. If you have time, having the group develop ground rules allows teachers to feel invested in how they participate. This builds a sense of empowerment in the participants ("Hey, she isn't telling us how to act. It's up to us to figure out what we think is important!") and a much greater sense of investment in following the rules. Common ground rules are:

- One person speaks at a time.
- Raise your hand if you have something to say.
- Listen to what other people are saying.
- Don't mock or attack other people's ideas.
- Be on time coming back from breaks (if it's a long meeting).
- Respect each other.

One process to develop ground rules is as follows:

- Begin by telling everyone that you want to set up some ground rules to follow during the PD.
- Ask for any suggestions from the group. If no one says anything, start by suggesting one yourself.
- It's usually most effective to "check in" with the whole group before you write up an idea ("Sue suggested raising our hands if we have something to say. Is that okay with everyone?"). Once you have gotten three to five rules, ask if anyone else has other suggestions.
- When you are finished, ask the group to be sure they agree with these ground rules and are willing to follow them.

Facilitating a Session

The facilitator is responsible for providing a safe working atmosphere for the meeting. But you're probably wondering, "What do I actually do **during** the meeting to guide the process along?" Here are the basic steps:

- Start the meeting on time.

- If latecomers trickle in, don't stop your process to acknowledge them. Wait until after a break or another appropriate time to have them introduce themselves.
- Welcome everyone.
 - Make a point to welcome everyone who comes. Don't complain about the size of a group if the turnout is small! Thank all of those who are there for coming, and analyze the attendance later. Go with who you have.
- Make introductions.
 - There are many ways for people to introduce themselves to each other that are better than just going around the room. The kind of introductions you make should depend on the number of people, the overall goals of the PD, and what kind of information it would be useful to know. Some key questions you can ask members to include in their introductions are:
 - What is your position and how long have you been with our district (if the participants don't know each other well)?
 - What do you want to know about the PD topic?
 - Sometimes, you can combine introductions with an "icebreaker." Icebreakers can:
 - Break down feelings of unfamiliarity and shyness.
 - Help people shift roles—from their "work" selves to their "more human" selves.
 - Build a sense of being part of a team.
 - Help share participants' skills and experiences.

Two example introductions/icebreakers are:

1. In pairs, ask people to turn to the person next to them and share their name, position, and three other facts about themselves that others might not know. Then, have each pair introduce **each other** to the group. This helps to get strangers acquainted and for people to feel safe—they already know at least one other person, and didn't have to share information directly in front of a big group at the beginning of the meeting.
2. In a large group, ask everyone to write down two true statements about themselves and one false one. Then, every person reads their statements and the whole group has to guess which one is false. This helps the audience get acquainted and relaxed.

When doing introductions and icebreakers, it's important to remember:

- Every participant needs to take part in the activity. The only exception may be latecomers who arrive after the introductions are completed. At the first possible moment, ask the latecomers to say their name and any other information you feel they need to share in order for everyone to feel comfortable.
- Be sensitive to the culture, age, and gender of group members and any other factors when deciding how to do introductions. Also, keep in mind what you want to accomplish with the activity. Don't do something only because it seems like fun.
- It is important to make everyone feel welcome at the beginning of the meeting. This sets the tone for the rest of the session.
- Don't forget to introduce yourself. You want to make sure that you establish why you are facilitating the meeting and why you are in a position to do so.

- Review the agenda, objectives, and ground rules for the PD.
 - Go over outcomes and what's going to happen in the PD.
 - Discuss ground rules (if time allows).
- Encourage participation.
 - Encourage people to share their experiences and ideas and urge those with relevant background information to share it at appropriate times.
- Stick to the agenda.
 - Groups tend to wander far from the original agenda, sometimes without knowing it. When you hear the discussion wandering off, bring it to the group's attention. You can say, "That's an interesting issue, but perhaps we should get back to the original discussion."
- Respect everyone's rights.
 - Sometimes, people dominate a discussion because they are really passionate about an issue and have a lot to say. One way to channel their interest is to suggest that they consider leading a separate discussion on that topic at a different time. Other people, however, may talk to hear themselves talk. If someone like that shows up at your meeting, look further ahead in this guide for some tips on how to manage this situation.
- Be flexible.
 - Sometimes questions or issues will arise in the meeting that are so important, they will take much more time than you thought. You may run over time or need to alter your agenda to discuss them. If necessary, ask for a short break to confer with co-facilitators to handle the issue and how to restructure the agenda. Be prepared to recommend an alternate agenda, dropping some items if necessary.
- Summarize the meeting results and necessary follow-ups.
 - Before ending the meeting, summarize the key points that were made. Be sure to also summarize the follow-up actions that were agreed on that need to take place. Remind everyone how much good work was done. Refer back to the objectives to show how much you accomplished.
- Thank the participants.
 - Take a minute to thank people who prepared things for the PD, or did any work towards making the PD happen. Thank all of the participants for their input and energy and for making the PD a success.
- Close the PD.
 - People appreciate nothing more than a meeting that ends on time! It's usually a good idea to have some "closure" in a PD, especially if it was long, if there were any sticky situations that caused tension, or if group members worked especially hard to come to decisions or make plans.
 - A nice way to close a PD training session is to go around the room and have people say one word that describes how they are feeling now that all of this work has been done. You'll usually get answers from "exhausted" to "energized"! If it's been a good meeting, even the "exhausted" ones will stick around before leaving.

Presenter Tips

- ✓ Don't memorize a script.
 - A well-prepared agenda and notes of key points will help you be flexible and natural.
- ✓ Watch the group's body language.
 - Are people shifting in their seats? Are they bored? Tired? Looking confused? You may need to take a break, or adjust the pace of the PD. And if you see confused looks on too many faces, you may need to stop and check in with the group and ensure that everyone knows where you are in the agenda.
- ✓ Summarize and pause.
 - When you finish a point or section of the PD, summarize the main points and pause for questions and comments before moving on. Learn to "feel out" how long to pause—make sure your audience has enough time to think about and ask questions.
- ✓ Be aware of your own behavior.
 - Watch your voice and physical manner. Are you making eye contact, so people feel engaged? Take a break to calm down if you feel nervous. How you act makes an impact on how participants feel.
- ✓ Watch your speech.
 - Be careful not to speak negatively or stereotypically about groups of people.

Dealing with Domineering Group Members: Preventions and Interventions

Prevention

Try using these preventions when you set up your meeting to try to rule out disruption.

- **Get agreement on the agenda, ground rules, and outcomes.**
 - In other words, agree on the process. These process agreements create a sense of shared accountability and ownership of the PD, joint responsibility for how the PD is run, and group investment in whether the outcomes and goals are achieved.
- **Listen carefully.**
 - Listen closely to understand a point someone is making. Check back if you are summarizing what they said, asking the person if you understood their idea correctly.
- **Show respect for experience.**
 - Encourage teachers to share strategies, stories from the field, and lessons they've learned. Value the experience and wisdom in the room.
- **Find out the group's expectations.**
 - Make sure to uncover what attendees think the PD is about or why they are attending. When you find out, be clear about what will and won't be covered in this PD. Make plans for how to cover issues that won't be addressed—write them down and agree to address them at the end of the meeting, or have the group agree that you will follow up on unfinished questions.
 - There are many ways to find out what the group's expectations of the meeting are. Try asking everyone to finish this sentence: "I want to leave here today knowing..."

- **Don't be defensive.**
 - If you are attacked or criticized, take a breath and a "mental step" backward before responding. Once you become defensive, you risk losing the group's trust and making others feel they can't be honest with you.
- **Get "buy-in" from power players.**
 - If there are influential or powerful personnel attending the PD, ask if you can acknowledge them at the start of the meeting. Try giving them roles to play during the PD such as a "sounding board" for you at breaks, or to check in with about how the PD is going.

Interventions

Try using these interventions when a domineering audience member is disrupting the meeting.

- **Have the group decide.**
 - If someone is dominating the meeting, refuses to stick to the agenda, keeps bringing up the same point again and again, or challenges how you are handling the meeting:
 - First try to remind them about the agreed-on agenda.
 - If that doesn't work, ask the group how they would like to address that person's participation. Let the group support you.
- **Use the agenda and ground rules.**
 - If someone keeps going off the agenda, has side conversations through the whole meeting, or verbally attacks others:
 - Go back to the agenda and ground rules and remind the group of the PD goals described at the beginning of the meeting.
- **Be honest. Say what's going on.**
 - If someone is trying to intimidate you, if you feel upset or undermined, and if you need to pull the group behind you:
 - It's better to say what's going on than try to cover it up. Everyone will be aware of the dynamic in the room. The group will get behind you if you are honest and up-front about the situation.
- **Accept or legitimize the point.**
 - If there is someone who keeps expressing doubts about the group's ability to accomplish anything, is bitter and puts down others' suggestions, or keeps bringing up the same point over and over, try one or more of these approaches:
 - Show that you understand their concern by telling them that you understand how important it is to them. Legitimize the issue by saying, "It's a very important point and one I'm sure we all feel is critical."
 - If feasible, make a bargain to discuss their concern for a short period of time ("Okay, let's discuss what you're thinking for five minutes, and then we ought to move on to make sure we can finish our agenda."). If that doesn't work, agree to defer the issue to the end of the meeting, or suggest a way to explore it further at a different time.
 - If less confrontational tactics haven't worked, and someone keeps verbally attacking others or cutting others off:

- Take a break and invite the domineering person outside the room or into an online breakout room and politely but firmly state your feelings about how disruptive their behavior is to the group. Determine if there are other ways to address that person's concerns, but make it clear you will not tolerate them disrespecting others or preventing the PD from continuing.